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1. Executive Summary

BITA - PATHWAYS is the largest voluntary sector organisation in Birmingham serving the rehabilitation needs of people with mental health difficulties. It has a high profile and a very substantial operating base.

The organisation has headquarters, a workshop, and the Warwick Training Centre, on the main operating site at Alcester Street Digbeth with satellite operations at St Anne's in Saltley, Small Heath, Mosley, and Harborne.

Over the last 44 years BITA - Pathways has served the people of Birmingham well and in recent years there have been substantial changes. However it is acknowledged that the organisation now has opportunities to move further and faster to meet the challenges arising from the changes in the external environment and the needs of users in the future both in Secondary Care and Primary Care.

The main purpose of the organisation is set out in the Mission Statement **“To provide services in the most appropriate range of locations for people experiencing mental ill health offering work, training, and support, which promotes personal development and opportunities for progression towards employment.”**

The key aims for the future must be

- To demonstrate that the organisation is a source of excellent services for Learning and Work
- To provide a set of development pathways which can be adapted to suit the needs of a wide range of mental health service users
- To have a person centred organisation structure which enables the needs of the individual to be met
- To develop systems which allow support to be delivered via Individual Service Funds
- To promote the value of employment as a means of enabling users to achieve their maximum potential along the pathway from their initial state of mental ill health to full integration in the community.
- To deliver services in the most appropriate locations to meet the diverse needs of individuals and communities.
- To play a leading role in the delivery of learning and work services in partnership with appropriate organisations Birmingham wide.
- To give users the best service available from the combined resources of the agencies across Birmingham working in the field of mental ill health support.
- To obtain sufficient funding to enable us to maximise the use of our existing physical and staff resources and expand our activities where appropriate
- To ensure that the Board and management team have the training, skills, and experience to deliver the needs of the organisation.

The report sets out the objectives to achieve these aims under the following headings

- Image and Awareness
- Activities
- Locations
- The People We Serve
- Funding
- Governance

The final section of the report sets out a view of what BITA - Pathways will be like if all the objectives are achieved.

2. Introduction

The Board meeting on 20th March 2007 requested a Strategic Review be conducted

- To recognise the major changes which have taken place in the health environment since the first strategy review in 2002
- To consult with stakeholders on the proposal to serve a new group of users who have Primary Care needs
- To explore possibilities for the extension of current activities with Secondary Care users
- To review and update the strategic plan for a new period 2008-2011

The purpose of the current document is to set out the objectives necessary to accommodate the views expressed by a wide range of partners who contributed to a consultation exercise conducted during the summer of 2007. See Appendix 1 for details of organisations consulted.

Throughout the report there are references to “employment”. Given the wide range of capabilities of the people who BITA-Pathways serves the definition of employment which we use is **“employment in the broadest sense should be defined as being engaged in meaningful occupational activity about which one has had a choice and which may be a stepping stone to other things”**.

3. BITA - Pathways in Context

Over a period of almost 45 years BITA - Pathways has built up a unique combination of programmes recognising the fundamental importance of employment as a means of developing disciplines for life. Throughout that time it has provided in house employment for a very large number of people who would not have been employed anywhere else in Birmingham. In more recent years the Warwick Training Centre and the Employment Support team have given many other people the means to move on to external employment.

BITA - Pathways has a high profile and a very substantial operating base.

Annual Turnover 2006-7	£980,000
Staff employed as at Sept 2007	45
Total Service Users in 2006-7	513

It is perceived by some to be one of the largest voluntary sector organisations in Birmingham. There is much admiration for the way in which it has diversified and grown sources of income. Innovations such as Warwick Training, St Anne's, the Garden Pathway project and the Employment Support service are very much in line with the needs of today. One of our key stakeholders has commented, **“No other organisation in Birmingham has the same understanding of mental health issues. The programmes provide a whole range of meaningful activities with a safety net for those who need to take a step backwards when their health becomes unstable.”**

The heart of the organisation is the workshop complex at Alcester Street. It is a major asset. There is a subsidiary operation at the St Anne's Centre in Saltley with small offshoots in Small Heath, Moseley, and Harborne. The continuous evolution of the range of opportunities which is presented, has made BITA - Pathways ever more attractive and welcoming to the whole range of potential service users.

Parallel to the programme of updating our facilities and resources we also ensure that service users are challenged to greater levels of achievement in a closer partnership with the other agencies who are able to influence their overall rehabilitation. This process gives new hope, confidence, and self-esteem to each of our users to allow them to travel as far as possible along the road to real and sustained employment.

There was a time when BITA - Pathways was seen as a refuge providing shelter and in danger of developing dependency. Today it is working towards being a place of opportunity to which people can come for support knowing that within the organisation they will find the means and motivation to develop to their full potential.

We explore every opportunity for flexible funding. One of the key roles of BITA - Pathways is to persuade the wide range of organisations who have funds available for work with disadvantaged people that those suffering from mental ill health should have equal rights with others in the allocation of these funds.

Like many other organisations still more opportunities exist to develop to keep pace with the world around us. The strategic consultation on which this report is based set out to acknowledge the latest challenges of the environment in which we work

- The National Social Inclusion Programme
- The modernisation of Day care
- Moving people from benefits to economic activity
- Treating people in the Primary Care Sector wherever possible
- Learning and Skills Council training policies for mental health service users

and explore the possible consequences of the turning point at which we stand

- BITA Pathways was established to provide work or other meaningful daytime activity as therapy in a sheltered setting for those who were in what we would now refer to as "Secondary Care"
- BITA Pathways is a successful organisation which could run on as it is for many years doing what it has always done well
- In recent years the work of the Warwick Training Centre and St Anne's Training Centre have extended the original purpose to provide training and progression in to other activities for some users
- The advent of new treatment regimes has reduced the number of clients coming forward with the old severe long term diagnoses
- There is a growing new population of people for which there is no current specific provision who have transient mental health difficulties which, given the correct help and redirection, can be treated within the "Primary Care" sector preparing them to resume real work
- There is a general belief that the organisation is ready to expand and has the confidence and resources to do so... but in which direction?
- Any expansion of the organisation will need extra working facilities to be acquired almost certainly on other sites.

4. Aims for the Future

The history of the organisation has been a story of creating a centre of excellence, centrally located for equality of access from all parts of the City, designed around providing a range of group funded activities with economies of scale. The key theme for the future will be the provision of complex packages of support for individuals tailored to their specific needs and localities, funded by Individual Service Funds delivered from a variety of sources but coordinated via a single agreed plan. This has necessitated a change in our Mission Statement which is now

"To provide services in the most appropriate range of locations for people experiencing mental ill health offering work, training, and support, which promotes personal development and opportunities for progression towards employment."

To fulfil this set of needs the following aims will be addressed

- To demonstrate that the organisation is a source of excellent services for Learning and Work which at the same time operates in a way which provides a safety net for those who may need more than one attempt before achieving success
- To provide a set of development pathways which can be adapted to suit the needs of a wide range of mental health service users both within the Primary Care and Secondary Care frameworks.
- To have a person centred organisation structure which enables the needs of the individual to be met by presenting a wealth of opportunities with the minimum of constraints.
- To develop systems which allow support to be delivered via Individual Service Funds sometimes involving segments in more than one organisation as and when appropriate.
- To promote the value of employment as a means of enabling users to achieve their maximum potential along the pathway from their initial state of mental ill health to full integration in the community with good health and financial independence.
- To deliver services in the most appropriate locations to meet the diverse needs of individuals and communities.
- To play a leading role in the delivery of learning and work services in partnership with appropriate organisations Birmingham wide for people with mental ill health.
- To give users the best service available from the combined resources of the agencies across Birmingham working in the field of mental ill health support and rehabilitation.
- To obtain sufficient funding to enable us to maximise the use of our existing physical and staff resources and expand our activities where appropriate
- To ensure that the Board and management team have the training, skills, and experience to deliver the needs of the organisation.

5. How we intend to achieve these Aims

To make progress towards these aims the following objectives and strategies for action have been defined.

5.1 Image and Awareness

5.1.1 Objective 1 Review Branding

To ensure that BITA-Pathways presents an image which clearly demonstrates the wide range of facilities and opportunities for development which it offers to both Primary Care and Secondary Care service users

Strategies

- Use the 45th Anniversary in 2008 as an opportunity to review and update the name and image of the organisation using the REALISE Project for resources

5.1.2 Objective 2 Marketing to Potential Users

To ensure that BITA - Pathways presents a variety of images to individual current and potential users which assists people to engage with our services whatever their mental health needs might be.

Strategies

- Develop the theme of “a source of excellent support for continuous personal development”.
- Make opportunities to communicate and celebrate the achievements of users and the organisation and demonstrate how the organisation has changed
- Generate an image of an organisation which is open, engaging, flexible, adaptable, up to date and excited about doing a wide range of new things and in new places where this is appropriate.

5.1.3 Objective 3 Potential Funding Organisations

To ensure that BITA - Pathways presents an image to current and potential funding organisations which makes BITA - Pathways their first choice for delivery of programmes to fulfil their own objectives.

Strategies

- Maintain good working relationships with all relevant organisations
- Generate evidence by means of user surveys and peer evaluations to encourage funders and to inform our development programme
- Celebrate our achievements
- Publicise the efforts of BITA - Pathways working for the people of Birmingham who suffer from mental ill health
- Demonstrate that BITA – Pathways is a reliable deliverer of value for money programmes
- Develop appropriate systems to measure a key set of measured outcomes to demonstrate “moving forward” by all users on all activities.

5.1.4 Objective 4 Commercial Partners

To ensure that current and potential commercial partners are fully aware of the capabilities of the organisation as a source of goods and service delivery and a user of work placements and employment opportunities.

Strategies

- Publicise the organisation as a source of good products, and a place where high quality sub contract work can be placed for a wide range of activities and commercial and industrial sectors.
- Raise awareness of the need for flexible understanding of our users as they initially enter the work place, the support which we can give including a physical presence, and the record of loyalty which our users are prepared to display in exchange for the opportunity to re-enter the world of external employment.
- Publicise our ability to work in joint ventures with others e.g. the Chapman Road Café.

5.1.5 Objective 5 Partnership Building for Joint Working

To project ourselves as a collaborative partner in joint projects.

Strategies

- Ensure that prospective partners have a correct and rounded view of what we do and our experience in working together for mutual benefit
- Raise awareness of our role as a strong partner with a track record of delivering outcomes to the full satisfaction of funding providers

5.2 Activities

5.2.1 Objective 1 Purpose

To ensure that BITA - Pathways makes a comprehensive offer of opportunities sufficient to satisfy the needs of the whole client base (mental health users including some who have Learning Disabilities)

Strategy

- Maintain a spectrum of services for progression towards independence via learning and work within the organisation, and employment in the outside world to generate a broad spectrum of clearly defined opportunities or stepping stones which can be used separately or in combination to satisfy the needs of each individual user
- To define activities in a series of Pathways which can accommodate individuals joining or leaving at any point or time to suit their own needs
- Develop a clear distinction between pathways designed for our traditional longer term Secondary Care users and pathways designed to encourage participation by a new constituency of Primary Care users
- Generate every opportunity for people to progress through and out of the organisation but maintain as a safety net the possibility of being able to take a step backwards at any time for those who falter and need to return for more support.

5.2.2 Objective 2 Value of Activities

To enable users to achieve their maximum potential in the journey from their initial state of mental ill health to full integration in the community with good health and financial independence

Strategies

- Provide learning and work and appropriate qualifications which
 - Enables users to have a worthwhile occupation
 - Provides a continuous opportunity for users to up rate their skills and experience to achieve their maximum potential in any environment
 - Gives experience in an authentic commercial environment to prepare people for work in increasingly demanding situations
 - Is of value to the individual as a personal selling point when they come to seek external opportunities
 - In the case of Primary Care users assumes that they will return to their former status if not to their former job

5.2.3 Objective 3 Breadth of Activities

To continue to expand the range of pathways available to users to provide more choice and higher levels of skills whilst maintaining and developing the existing well proven portfolio of activities.

Strategies

- Expand the range of products and skills in the Alcester Street workshop
- Continue to develop the textile activities at St Anne's
- Expand the range of activities available to users of the Craft Centre at Alcester Street
- Expand customer service training and work experience
- Expand the gardening, food production, and outdoor activities associated with the Garden Pathway
- Expand catering activities
- Expand administration activities

5.2.4 Objective 4 Recruitment

To recruit service users from across the whole range of mental health needs, in Primary Care and Secondary Care, who could benefit from the opportunities being presented

Strategies

- Develop a single assessment route after recruitment from which people would be directed to the most appropriate set of activities to maximise their progress back to good health and the outside world
- Develop close links with Gateway Workers and Primary Care Link Workers within Community Mental Health Teams
- Target new groups of potential users by taking the delivery of some services to community facilities and other partners premises where people gather for other purposes to engage people locally before attracting them to central provision

5.2.5 Objective 5 Developing Partnership Working

To seek out opportunities to work with partner organisations to develop integrated and complex packages of support which meet all the needs of potential users

Strategies

- Use the experience gained from the successful joint project with BDRC as a basis to develop more joint projects
- Develop systems for creating Individual Service Funds as integrated packages involving delivery of support from a number of partners as a single personal programme

5.3 Locations

5.3.1 Objective 1 Headquarters Alcester Street

To maintain and develop the BITA - Pathways main site in Alcester Street as the central location for activities whilst recognising the changes taking place in Digbeth which may provide an advantageous opportunity for changing location within the period of the strategy. .

Strategies

- Maintain and update the Alcester Street workspace as resources allow as a series of flexible units appropriate to a wide range of activities
- Be aware of the potential opportunities for the Alcester Street premises and site within the medium term regeneration plans for the development of that part of Birmingham
- Maintain a good working environment for the significant portion of current users who will stay with us long term
- Consult with users at key steps in this process

5.3.2 Objective 2 Developing a Breadth of Locations

To extend the number of locations at which services are delivered.

Strategies

- Develop satellite locations for particular purposes in appropriate locations
 - Develop a service in the North of the City on a similar model to the St Anne's centre possibly in conjunction with Birmingham East and North PCT and Birmingham Mind
 - Develop services to meet the needs of diverse communities in the Heart of Birmingham area in conjunction with HoB PCT which provide opportunities especially for the 72% BME community in that area
- Work with partners in community locations e.g. Colleges, Libraries, Community Centres to engage potential users on their own terms with the intention of drawing them in to more central activities as their confidence and trust increases

5.3.3 Objective 3 Anticipating a Change of Central Location

To be prepared to respond to any opportunity which might arise.

Strategies

- Act with caution but if a suitable offer arises it would be imprudent to decline it.
- Think through the criteria defining a suitable new location
 - Maintaining central accessibility for the whole city for the workshop
 - The necessary degree of co-location of functions currently placed together at Alcester Street

5.4 The people we serve

5.4.1 Objective 1 Diversity

To ensure that our activities comprehensively reflect the needs of the diverse communities in which we operate.

Strategies

- Review all our activities taking every opportunity to redress imbalance where it currently exists
- Take advantage of specific funding wherever it is available to address target groups which are currently under represented
- Redesign our provision where necessary so that it is tailored to meet the needs of individuals with maximum flexibility

5.4.2 Objective 2 Levels of Need

To order activities in such a way that people of varying needs e.g. Primary vs Secondary can call on just the services which are most advantageous to them without having to participate in activities which are not relevant or a good use of their time.

Strategies

- Be aware of this need in all programme and system design.

5.5 Funding

5.5.1 Objective 1 Responding to Frequent Changes in Funding Regimes

To ensure the continuity of present funding throughout the major changes taking place in the structure of organisations with whom we work.

Strategies

- Maintain our working relationships with the three Primary Care Trusts
- To develop a good working relationship with the Mental Health Trust, and the Adults and Communities Section of Birmingham City Council
- Continue the relationship with Birmingham Regeneration to maximise funding opportunities arising from initiatives such as Local Area Agreements
- Develop a closer working relationship with the Learning and Skills Council and the Connexions service to obtain funding for pre employment training and Information, Advice, and Guidance contracts.
- Develop the partnership with the Probation Service and be aware of new opportunities for project work
- Develop a good understanding of what the agencies believe they need from us to meet their performance objectives

5.5.2 Objective 2 Growth of funding

To continuously seek new sources of funding and expand activities where possible

Strategies

- Structure our programmes so that they clearly demonstrate the principle of “continuous improvement towards maximum individual potential” which is one of the key motivators for funding
- Demonstrate evidence of our ability to generate good value for money in all the things that we do
- Develop hard and soft performance indicators for all our activities, formal or informal, which can be used to demonstrate progress in moving on however gradual it may be

5.5.3 Objective 3 Income Generation

To develop methods of generating income from commercial sources to lessen the degree of dependence on short term performance based statutory funding

Strategies

- Develop the textile, craft, and workshop pathways to generate as much income as possible whilst always ensuring that the most important role of such activities in our environment is therapeutic with the activities in use being chosen for their value in training and building skills which will be of use in subsequent employment not just in generating income for the company.

5.6 Governance

5.6.1 Objective 1 Board Development

To ensure that the membership and capability of the Board reflects the future needs of the company.

Strategies

- Create a succession plan to ensure continuity of the Board by engaging a range of individuals who could be potential directors in the activities of the organisation
- Ensure that the attributes of the directors match the demands which will arise from future developments and provide continuous development training where required
- Determine that the members of the Board have the time availability and commitment to maintain the necessary pace of change
- Ensure that the practices of the Board are adequate to meet the challenges which it will have to face if it is to best serve users in the future

5.6.2 Objective 2 Meeting Statutory Obligations

To ensure that the Board complies with the continuous stream of new governance requirements emanating from the Charities Commission and Government

Strategies

- Undertake regular reviews of change and training programmes to suit.

5.6.3 Objective 3 Senior Management Development

To ensure that the senior management team continues to have the ability to meet the level of activity arising from the programme of development in all sections of the business.

Strategies

- Regularly review the Management structure and administration support to ensure that capacity is being kept in line with the ever increasing demand from new and different projects.

6. BITA - Pathways tomorrow – Our Vision

BITA - Pathways is an organisation which wants to move forward in every respect creating growth of opportunities for users, employees, and all our stakeholders. With the achievement of the above objectives in the future BITA - Pathways will continue to be a centre of excellent support acting as the long standing champion for mental health rehabilitation within the social inclusion and community building strategies for the City of Birmingham.

It is anticipated that funding will move away from block grants to be delivered with the advantages of scale towards Individual Service Funds given to people to develop their own integrated, and often complex, packages of services from a number of organisations. BITA - Pathways intends to take the lead in developing this approach in conjunction with the many partners it now has.

Whilst historically the majority of users of BITA - Pathways facilities have come from the Secondary Care sector it is anticipated that in the future much more emphasis will be placed on capturing people in the Primary Care sector to engage them in a package of help which will concentrate on getting them back in to employment as soon as possible thus preventing them from moving in to and having to escape from Secondary Care.

To make this possible service delivery will not be expanded at Alcester Street. There will be a policy of taking services to where people are and meeting their specific needs with programmes tailored to their localities. The main targets in this respect are to develop a facility equivalent to the St Anne's Centre but in the North of the City, to provide a new centre in the HoB area perhaps developing the use of complementary therapies as a source of appropriate training and an income earning opportunity, and to establish small operations in community and educational facilities across the City.

In our long term vision we anticipate the day when mental ill health carries no more stigma than physical ill health and those who are affected are welcomed and supported in to employment at the limit of their potential on the road to regaining full independence and playing a worthwhile role in society.

We would expect the quality and creativity of this work to continue to achieve national and international recognition as a flagship activity within our City.

7. Appendix 1 Details of Organisations Consulted

Organisation	Address	Initial Contact	Person met	Date
Birmingham City Council Planning and Regeneration	Alpha Tower Suffolk Street Queensway Birmingham B1 1TR	Sue Hawkins Disability Services Manager	Sue Hawkins Disability Services Manager	17/5/07
Birmingham City Council Social Services	Level 5 Louisa Ryland House 44 Newhall Street Birmingham B3 3PL	Simon Fenton Commissioning Manager- Learning Disabilities	Simon Fenton Commissioning Manager- Learning Disabilities	17/05/07
Birmingham City Council Adults & Communities	Louisa Ryland House 44 Newhall Street Birmingham B3 3PL	Jon Tomlinson Service Director Policy, Strategy & Commissioning	Jon Caan Manager Strategy, Commissioning and Contracting	21/05/07
Birmingham East & North Primary Care Trust	Suite 20, Waterlinks House Richard Street Birmingham B7 4AA	Mrs Sophia Christie Chief Executive	Tony Ruffell Deputy Director Strategy and Commissioning	31/5/07
West Midlands Strategic Health Authority	St Chad's Court 213 Hagley Road Edgbaston Birmingham B16 9RG	Cynthia Bowers Chief Executive	Lawrence Moulin Mental Health Lead	31/5/07
Birmingham & Solihull Learning and Skills Council	15 Bartholomew Row Birmingham B5 5JU	Gill Howland Chief Executive	Iris Flaum Kate Webb	31/5/07
Birmingham & Solihull Mental Health Trust	Trust Head Quarters B 1 50 Summerhill Road Birmingham B1 3RB	Ms Sue Turner Chief Executive	Glynis Markham Executive Director of Strategic Development Jo Beale Director of Social Inclusion	4/7/07
Heart of Birmingham Teaching Primary Care Trust	Bartholomew House 142 Hagley Road Birmingham B16 9PA	Safina Mistry Commissioning Manager	Denise McLellan Director of Commissioning Safina Mistry Commissioning Manager	14/8/07